

PORTFOLIO MANAGEMENT

YOUR NEEDS

You want your assets to be professionally managed according to your personal objectives, without you having to be involved in the day-to-day selection and execution process.

OUR SERVICES

- > Together with you we define an investment strategy.
The selection of the appropriate investment strategy is the result of a structured and analytical process, taking into consideration your personal situation (e.g. family situation, living costs, personal goals, personal needs and investment horizon, your risk capacity and risk tolerance).
- > We apply a structured investment process for the management of your assets. It contains, among others, the following elements:
 - Collection and assessment of research material from different banks and brokers
 - Development and simulation of forecasts and scenarios
 - Support by chart-technical information and analyses
 - The asset allocation is then defined and formulated by our independent investment committee (top-down).
- > We are responsible for the implementation of the investment strategy and the selection of the appropriate instruments (bottom-up).
- > We are completely independent and may thus select the appropriate products. We are under no obligation to use any specific provider. We may buy any investment product in any currency worldwide.
- > We inform you regularly about the development of your assets, if required, also on a consolidated basis.
- > Our internal control process assures that your assets are invested according to the defined investment strategy.

YOUR BENEFITS

- > Our specialists continuously monitor the markets as well as political and economic developments around the globe.
- > By signing a portfolio management agreement with us, you allow us to take the day-to-day decisions for you.
- > Our regular updates enable you to maintain a comprehensive overview of the development of your assets.